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ABSTRACT

This teacher's guide for a course on basic verbal and written skills for supervisors contains nine sections that cover the following topics: (1) introduction to supervision and group goals; (2) supervision and learning style; (3) listening; (4) feedback; (5) meetings; (6) motivating; (7) delegating; (8) business writing; and (9) conclusion (course summary and feedback). Each section contains a number of class sessions that consist of objectives, activities, materials needed, agenda, activity descriptions, teaching tips, student handouts, and concluding activities. (KC)

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ED 426 225

SUPERVISION BASICS:

Verbal & Written Communication

Carole Starr

Casco Bay Partnership for Workplace Education, 1997

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CE 077 225

SUPERVISION BASICS

VERBAL & WRITTEN COMMUNICATION

OUTLINE & OBJECTIVES

Section 1

Introduction to Supervision/Group Goals

Participants and instructor will get to know one another

A positive group learning environment will be established

Participants will gain understanding of the tasks & responsibilities of supervisors

Instructor will get an overview of supervision at the company

Instructor will gain knowledge of students prior experience/understanding of supervision

Instructor will find out participants' learning interests

Course content will be decided jointly by the participants and instructor

Section 2

Supervision and Learning Style

Participants will gain awareness of/respect for differences in styles of communication, learning and supervision

Participants will gain self-awareness of individual style and its relationship to other people

Section 3

Listening

Participants will recognize the importance of listening

Participants will be able to identify and use the listening techniques of prompting, rephrasing, feelings and hopes

Participants will be able to use the appropriate listening technique at the appropriate time

Participants will gain self-awareness of their own listening style, strengths and weaknesses

Section 4

Feedback

Participants will recognize the importance of feedback

Participants will know the principles and components of effective feedback

Participants will recognize appropriate styles of giving feedback

Participants will be able to give oral and written feedback

Section 5

Meetings

Participants will be able to identify the types & purposes of meetings, such as information gathering, decision making and reporting out

Participants will recognize the importance of meeting processes & functions such as building agendas, using warm-ups, creating norms and identifying different decision making styles

Participants will participate effectively in meetings by practicing the roles of facilitator, minute-taker, scribe and participant

Participants will learn how to deal with difficult meeting behaviors

Section 6

Motivating

Participants will be familiar with three classic theories of motivation

Participants will be able to apply motivation theories to their own workplace

Participants will be able to express educated opinions about the value of motivational theories

Section 7

Delegating

Participants will know the definition of delegation

Participants will be able to determine appropriate tasks to delegate

Participants will know and be able to use procedures for successful delegation

Section 8

Business Writing

Participants will be able to identify characteristics of effective business writing

Participants will know formats for memos and business letters

Participants will be able to follow examples of proper format and style

Section 9

Conclusion

Participants will be able to discuss course content and learnings

Participants will be able to identify areas for future development

SUPERVISION BASICS SECTION #1

Introduction to Supervision/Group Goals

Sessions 1-3

Major Objectives:

Participants and instructor will get to know one another

A positive group learning environment will be established

Participants will gain understanding of the tasks & responsibilities of supervisors

Instructor will get an overview of supervision at the company

Instructor will gain knowledge of students prior experience/understanding of supervision

Instructor will find out participants' learning interests

Course content will be decided jointly by the participants and instructor

Major Activities:

Introductions & Word Association

Biopoem

Rules, Roles & Responsibilities

Supervision Mindmaps

Questions about Supervision

SUPERVISION BASICS

Session #1

Objectives

Introductions, begin to create group learning environment

Materials Needed

Flip chart, markers, tape

Agenda

Welcome/Introductions & Word Association
Review Objectives and Agenda
Biopoem
Class Development History
Rules, Roles & Responsibilities
Conclusion

Description of Activities

Welcome/Introductions & Word Association (10-15 minutes)

Purpose: to introduce participants to each other and the facilitator, to gather information about participants' impressions of supervision, and to find out participant hopes for the class

Facilitator welcomes participants, introduces self, course logistics—time, dates, room

Participants introduce themselves around the room
- Name
- Word Association—supervision—What is their first response? Thought, feeling?

Facilitator records responses on flip
- Discuss patterns, similarities, differences of responses

Discuss participant hopes for the class—share around the room
- Relate hopes to class content, comment on similar hopes participants may have

Review Objectives, Agenda (2-5 minutes)

Purpose: to preview class content for participants, so they know what to expect

Biopoem (15-20 minutes)

Purpose: to help participants and facilitator get to know one another beyond just names, to start the process of the class becoming a well-functioning group

Introduce and share purpose of exercise

One objective for this session is to start the group process. Well-functioning groups don't just happen by accident. You have to spend time getting to know one another, and setting ground rules. This next exercise is designed to help us get to know one another better.

Handout biopoem form and review—see attached page

Facilitator models with own biopoem

Participants work on their own individual biopoems

Share biopoems

Class Development History (5-10 minutes)

Purpose: to explain why the class was developed, to find out supervisors' experience transitioning from worker to supervisor

Facilitator asks class how many are supervisors, how many would like to be

Facilitator asks supervisors how they got to be supervisors. Did they receive training? What kind? Was it difficult to go from being a worker to a supervisor? How are the responsibilities different?

Facilitator explains that this class was developed because supervisors are often promoted based on their technical ability. However, supervisors spend the majority of their time dealing with people/communication issues, not technical issues. It's a big jump from doing the work to overseeing the work. Learning to be a supervisor is often trial by fire. This class designed to make that transition easier.

Rules, Roles & Responsibilities (1 ¼ - 1 ½ hours)

Purpose: to create rules, guidelines that everyone will agree to follow, to clarify expectations of participants and facilitator, to create positive learning environment

Introduce 3 R's

In the 19th and early 20th centuries this meant reading, writing & arithmetic

Modern update—rules, roles & responsibilities

Rules—Norms

Define norms-- rules or guidelines regarding interaction

Norms can be written or unwritten

Positive example—Everyone's opinion is important and valued

Negative example—Don't disagree with the boss

Norms are powerful—they determine how a group will operate

Norms naturally develop in a group

May be positive or negative

May be influenced by hierarchies, personalities, histories

Large group discussion—educational norms

What were some of the norms when you were in school?

Ex.—stay in your seat, don't talk back, don't interrupt the teacher

Were these norms written down?

What happened if you broke one?

Did you have any say in creating them?

Would you have learned better without some of them, or with other ones?

Exercise—Best/Worst Educational Experiences

Used to help participants develop norms for the class

Exercise requires participants to do a mindmap

Facilitator explains & models

Ex.—preparing for vacation to do list

Participants create a sample mindmap to learn the technique

Facilitator models personal positive or negative learning experience

Generalize norms from personal experience

Ex. If a negative educational experience was being yelled at by a teacher, a generalized norm could be "be respectful".

Participants mindmap details of best or worst educational/learning exp.

Share experiences in large group

Generalize norms, write on flip

Norms to add if no one does—fun, mutual respect, participation, ok to make mistakes, confidentiality, honest, start/end on time

Norms will be reviewed, edited & approved at next class

Conclusion (2-5 minutes)

Facilitator asks for any questions or comments from participants

Facilitator preview class content for next session

SUPERVISION BASICS

Session #2

Objectives

Finish set-up of learning environment, begin to gather information about participant interests

Materials Needed

Flip chart, markers, tape

Agenda

Check-in
Review Objectives, Agenda
Discuss Roles & Responsibilities
Clarify Norms
Supervision Mindmaps—Part 1
Conclusion

Description of Activities

Check-in (5-10 minutes)

Purpose: to find out participants state of mind, to help participants get mentally ready for class

Explain check-in—use hotel metaphor

Sample check-in: On a scale of 1-10 (1 low, 10 high) where are you today?

Review Objectives, Agenda (2-5 minutes)

Purpose: to preview class content for participants, so they know what to expect

Discuss Roles & Responsibilities (20 -30 minutes)

Purpose: see session #1

Roles

Draw a vertical line down the middle of the flip chart

Write "Participants" on one half, "Facilitator" on other half

Large group discussion--write responses on flip chart

What are the roles of participants?

Ex.—learner, listener, participant, leader

What are the roles of the facilitator?

Ex.—leader, organizer, listener

Roles are shared--everyone is a teacher and a learner

Responsibilities

Draw a vertical line down the middle of the flip chart

Write "Participants" on one half, "Facilitator" on other half

Large group discussion—write responses on flip chart

What are the responsibilities of participants?

Ex—be on time, let the facilitator know of absences, practice skills

What are the responsibilities of the facilitator?

Ex—be prepared, bring handouts, don't lecture, make it interesting

Clarify Norms (20 - 30 minutes)

Purpose: to make sure all participants understand and agree to norms

Review norms

Do they still make sense?

Any additions or subtractions?

Any duplicates? Can they be combined?

Should any be moved to the roles or responsibilities list?

Discuss each to ensure meaning is understood

Norms should be type-written and handed out at the next class

Supervision Mindmaps—Part 1 (40-50 minutes)

Purpose: to generate a large amount of information about supervision, to develop a "job description" of a supervisor, to find out how participants see the role of supervisor, to set the stage for participants to determine their learning interests

Each participant creates an individual mindmap on the questions below. These are done one at a time, with large group discussion and charting after each one. Answers are based on the participants experiences as or with supervisors. The purpose is to gather a large amount of information about supervision. The emphasis is on quantity of information. No editing out ideas. Participants will eventually use this information to determine the areas they are most interested in learning about. There will be some duplication of material, but that is ok. It is likely that these questions will be stretched over 2 class sessions.

What are the roles of a supervisor? (Ask for one to two word answers. Ex.—leader, teacher, manager, troubleshooter, disciplinarian, taskmaster, conflict resolver).

What are the tasks or responsibilities of supervisors? (Encourage class to be as specific and detailed as possible).

What skills should an effective supervisor possess? (Stress that you are looking for skills, not qualities—that is the next question).

What qualities should an effective supervisor possess?

What are some difficult kinds of people supervisors must deal with?

What are some difficult situations supervisors must deal with?

What kinds of documents do supervisors have to write? (This question may not be necessary if the group has identified many writing tasks in question #2).

Conclusion (2-5 minutes)

Facilitator asks for any questions or comments from participants

Facilitator previews class content for next session

SUPERVISION BASICS

Session #3

Objectives

Finish gathering information about participant interests, develop questions that the course will cover

Materials Needed

Flip chart, markers, tape

Agenda

Check-in
Review Objectives, Agenda
Review Rules, Roles & Responsibilities
Supervision Mindmaps—Part 2
Supervision Questions
Reflection

Description of Activities

Check-in (5-10 minutes)
Purpose: to find out participants state of mind, to help participants get mentally ready for class

Review Objectives, Agenda (2-5 minutes)
Purpose: to preview class content for participants, so they know what to expect

Review Rules, Roles & Responsibilities (2-5 minutes)
Purpose: to make sure facilitator transcribed rules, roles & responsibilities accurately, to get final agreement on class ground rules

Handout rules, roles & responsibilities
Any questions or comments?

Supervision Mindmaps—Part 2 (40-50 minutes)

Purpose—see session #2

Continue questions from session #1

Process Exercise

What did you learn about supervision?

Questions about Supervision (20-30 minutes)

Purpose: to encourage participants to recognize areas for learning and to ask questions about supervision

Post flip charts from previous exercise around the room. As participants look at them, encourage them to pay attention to skills/qualities they don't currently have, and to skills/tasks they would like to know how to do. Using the flip charts as reference materials, have participants write down as many questions as possible about supervision. Some examples may be—How do I deal with an employee who comes in late? What information should be included in a business letter? At this point, you are looking for quantity of questions. Participants then identify the 3-5 questions they would most like to answer. Facilitator writes them on the flip. Review each question to ensure it is understood. Participants then vote on the questions they would most like the class to answer. Each person gets 3-5 votes, depending on the class size. Participants go up to the flips and make hash marks next to the questions they would most like answered. Total hash marks. Discuss the priorities that have been revealed. Relate them to specific skills that can be taught

Type up flip charts and hand out at next class

Use participant priorities to develop a course outline—see attached sample

Reflection (10-15 minutes)

Purpose: to give participants the opportunity to recognize, discuss and write about what they learned in class

Each class, participants discuss and record learnings in a journal

Sample questions

What did you learn today?
What do you want to remember from today's class?
What did you like/dislike?
How can you use what you learned today?

SUPERVISION BASICS SECTION #2

Supervision and Learning Style

Session 4

Major Objectives:

Participants will gain awareness of/respect for differences in styles of communication, learning and supervision

Participants will gain self-awareness of individual style and its relationship to other people

Major Activities:

Decision Style Survey—based on Myers-Briggs Type Indicator

Exercises to Explain Letters

Appreciation Exercise

SUPERVISION BASICS

Session #4

Objectives

Participants will know what their 4-letter type means, be able to compare their type to others, understand how type relates to supervision

Materials Needed

Flip chart, markers, tape

Agenda

Check-in
Review Objectives, Agenda
Pre-Test Activity
Myers-Briggs Background/Shortened Test
Interpret and Discuss the Results
Reflection

Description of Activities

<u>*Check-in*</u> (5-10 minutes)

Purpose: to find out participants state of mind, to help participants get mentally ready for class

<u>*Review Objectives, Agenda*</u> (2-5 minutes)

Purpose: to preview class content for participants, so they know what to expect

<u>*Pre-Test Activity*</u> (5-10 minutes)

Purpose: to show participants how type can influence how they think about supervision situations (This purpose should not be shared with participants until this exercise is used, later in the class).

Ask participants to imagine the hardest/most difficult person for them to supervise

Ask them what does he/she do? Each participant writes down 3 specific behaviors.

Ex.—not "the employee doesn't work", but rather
"The employee isn't precise, doesn't follow instructions"

When participants are finished, ask them to put these aside until later.

Myers-Briggs Background/Shortened Test (25-30 minutes)

Purpose: to give participants knowledge of where this theory comes from, how reliable it is, how it is used

Background

Carl Jung, psychologist in the 1920's

Notion of temperament—each of us has different preferences—wants, desires, beliefs—these differences are to a large extent inborn. Wrote a book about his theory called Psychological Types. Jung's work was largely forgotten in later years.

Isabel Myers (daughter) & Kathryn Briggs (mother), psychologists in the 1950's

Rediscovered Jung's work. Devised a test based on his types, called the Myers-Briggs type indicator. The test identified 16 different types. Their work has been tested and validated around the world.

Class will take a shortened version of the Myers-Briggs

Decision Style Survey Form—see attached

Handout survey

Tell participants that this is based on preferences. There are no right or wrong answers. It's like being right or left handed. Neither one is better or more right than the other. They are just different ways of doing things. Participants should answer the questions as they really are, not how they'd like to be or think they should be.

Participants complete and score survey.

Draw chart of 16 types and chart class types

Interpret and Discuss Results (20-30 minutes)

Purpose: to give participants a basic understanding of what the letters and types mean, to help them see how this information can be used in supervision

Explain what each letter means and do exercises below

Write on flip

E	I	What energizes you?
S	N	How do you take in information?
T	F	How do you make decisions?
J	P	How do you deal with the outside world?

Exercises

E I Where do you sit in a crowded room—front or back?
Extroverts tend to the front, introverts to the back

S N Describe this room—write down words
Sensors—concrete facts, Intuitives—general impressions

T F Which rules you more, your head or heart?
Thinkers—head, Feelers—heart

J P You've been given a project by your boss that's due in three weeks.
He/she won't be checking on it. Do you start early or late? Do you finish with time to spare or just in the nick of time?
Judgers—start early finish early, Perceivers—start late finish just in time

Handout "The Four Preferences", "Strengths & Weaknesses" & "Preferences at Work"
See attached

Read and discuss
Is this true for you?
How can you use this information?

Divide group into 4 Temperaments—SP, SJ, NT, NF
Each group answers the following 2 questions:
How do you like to be appreciated?

How do you show appreciation to employees

Instruct groups to include details, no vagueness

Compare and contrast answers
How do the answers relate to the types?
How can supervisors use this information?

Handout "The Four Temperaments" and "Appreciation According to Type"
See attached

Read and discuss

Handout "Temperament in Leading"—See attached
Each participant reads his/her own temperament

Refer back to pre-test activity
Can your responses to the question be explained in terms of your type?

What are the implications for supervisors?

Reflection (10-15 minutes)

Purpose: to give participants the opportunity to recognize, discuss and write about what they learned in class

Each class, participants discuss and record learnings in a journal
Sample questions
What did you learn today?
What do you want to remember from today's class?
What did you like/dislike?
How can you use what you learned today?

SUPERVISION BASICS SECTION #3

Listening

Sessions 5-7

Major Objectives:

Participants will recognize the importance of listening

Participants will be able to identify and use the listening techniques of prompting, rephrasing, feelings and hopes

Participants will be able to use the appropriate listening technique at the appropriate time

Participants will gain self-awareness of their own listening style, strengths and weaknesses

Major Activities:

Model Listening Skills

One-on-one Listening Practice—prompting, rephrasing, feelings & hopes

Large Group Listening Practice

The Eight Responses

SUPERVISION BASICS

Session #5

Objectives

Understand the importance of listening, identify specific listening skills, practice prompting, rephrasing

Materials Needed

Flip chart, markers, tape

Agenda

Check-in
Review Objectives & Agenda
Review Supervision Questions
Review Class Outline
I-Can Forms
Listening Skills—prompting & rephrasing
Reflection

Description of Activities

<u>*Check-in*</u> (5-7 minutes)

Purpose: to find out participants' state of mind, to help participants get mentally ready for class

Ask participants to rate their mood on a scale of 1-10 (10 high, 1 low)

<u>*Review Objectives, Agenda*</u> (2-5 minutes)

Purpose: to preview class content for participants, so they know what to expect

Review Supervision Questions (5-7 minutes)

Purpose: to show participants the results of their work

See attached sample from American Tool

Any questions? Point out that the questions could be used as a job description for supervisors. Could also be used as a review to prepare for a supervisory interview.

Review Class Outline (5-7 minutes)

Purpose: to give participants an outline of the class, to show them how the outline relates to their learning interests

See attached sample from American Tool

Relate class outline to participant interests as identified in supervision questions
Any questions, additions, subtractions?

I-Can Forms (7-10 minutes)

Purpose: to get a "pre" evaluation of participants skills

See attached sample from American Tool

Listening Skills (1-1 ½ hours)

Purpose: to help participants recognize the value of listening skills, to identify key listening techniques, to practice skills of prompting and rephrasing

Discussion—"Seek first to understand, then to be understood"—written on flip

- What does this quote mean?
- Why doesn't it read "seek first to be understood, then to understand"?
- Why is this important for supervisors? (Prevents misunderstandings, gives listener a better chance of having his/her ideas heard when he/she speaks)
- What do you have to do in order to follow this rule? (Hold in your own ideas, judgments, ask questions, be open, be patient)

Model Effective Listening

Ask for volunteer to speak about a topic that has energy for him/her

Facilitator models effective listening skills

Non-verbals, prompting, silence, rephrasing, feelings, hopes

Participants write down specific behaviors, effects they observe

Discussion—scribe answers on flip chart

- What behaviors did you observe?
- What was the effect of those behaviors on the speaker?
- What didn't the listener do?

Facilitator briefly explains each skill—prompting, rephrasing, feelings, hopes
Skills will be covered one at a time, in depth

Prompting—verbal and non-verbal encouragements

Discuss prompts

Verbal—"hmm, hmm", "go on", "then what"

Non-verbal—eye-contact, open body posture, leaning forward, facing fully, nodding, smiling

Up to 80% of our message is conveyed through non-verbals
Example—say "good job" as praise and as sarcasm

Non-verbals are culturally specific and therefore easily misunderstood
Example—eye contact in Asian vs. American culture

Ask for a volunteer to not prompt while the facilitator is speaking

What happened? Effect on the speaker? (Without prompting, the speaker tends to be disorganized in his/her thoughts, lots of "ums", "ahs").

Practice prompts

Divide group into pairs

One speaks, one prompts—prompting only, no other speech
Switch roles

Process in large group

What was it like to prompt only? Discuss importance of silence
As the speaker, did you feel listened to?

Rephrasing

Point out that a listener can prompt without really listening; listeners mind can be miles away, even while he/she smiles, Nods, etc. Therefore, other techniques are needed to show that the listener is really listening. Rephrasing is one of those techniques.

Handout Empathic Communication Participant Manual Page 64—See attached
Review rephrasing, discuss benefits

Model rephrasing

Ask for volunteer to explain a work process (Ex.—setting up a machine, ordering supplies, filling out paperwork)

Facilitator rephrases to ensure understanding

Facilitator rephrases to ensure understanding

Discussion—What effect did the rephrasing have on the speaker & listener?

Ask for volunteer to be a long winded speaker

Facilitator rephrases to politely close the conversation

Discussion—What effect did the rephrasing have on the speaker & listener?

Large Group Discussion

It is likely that the facilitator will have to ask questions and rephrase during the above exercise. Therefore, the class should discuss the differences between rephrasing and asking questions—both are listening techniques. Too many questions may seem intrusive to the speaker, especially if the subject is an emotional one. Rephrasing is a gentler way of listening. Good to have multiple tools for listening.

Practice rephrasing

Divide group into pairs

One speaks—gives directions about a process unfamiliar to listener (Ex. Changing car oil, cleaning gun, directions to location)

Other listens—prompts and rephrases (it may be necessary to ask questions, but these should be kept to a minimum)

Switch roles

Process in large group

What was it like to rephrase? What was difficult/easy?

What effect did it have on the listener & speaker?

Did the rephrasing clear up any misunderstandings?

Divide group into different pairs

One speaks—long winded

Other listens—prompts and rephrases to close conversation

Switch roles

Process in large group

What was it like to rephrase in this situation?

What effect did the rephrasing have?

Did the speaker feel cut off?

Value of rephrasing

Discussion

How can you use this skill as a supervisor?

What are some specific situations where it would be useful?

Point out that the speaker can ask the listener to rephrase

Helpful when supervisor gives directions to employee

Ensures understanding

<u>*Reflection*</u> (10-15 minutes)

Purpose: to give participants the opportunity to recognize, discuss and write about what they learned in class

Each class, participants discuss and record learnings in a journal

Sample questions

What did you learn today?

What do you want to remember from today's class?

What did you like/dislike?

How can you use what you learned today?

SUPERVISION BASICS

Session #6

Objectives

See benefits of rephrasing in group communication, understand the importance of feelings in communication, identify the difference between true feelings and feelings mixed with evaluations, identify the feelings in speaker's statements

Materials Needed

Flip chart, markers, tape

Agenda

Check-in
Review Objectives & Agenda
Listening Skills—rephrasing & feelings
Reflection

Description of Activities

Check-in (5-7 minutes)

Purpose: to find out participants' state of mind, to help participants get mentally ready for class

Ask participants to rate their mood on a scale of 1-10 (10 high, 1 low)

Review Objectives, Agenda (2-5 minutes)

Purpose: to preview class content for participants, so they know what to expect

Listening Skills (1 ½ -1 ¾ hours)

Purpose: to help participants see the value of rephrasing in group discussions, to recognize feelings & hopes as the most effective listening technique in emotional situations, to be able to guess at the speaker's feelings

Review previous class—prompting & rephrasing
How to, situations where it's beneficial, value

Rephrasing
Large group listening exercise
Purpose—to show the value of rephrasing in group settings (do not share this purpose with the group until after the exercise)

Ask group to choose a controversial subject to discuss

Allow group to begin its discussion—don't give them any rules
After 10 minutes, stop the discussion and ask how it's going
Is the group listening to each other or are people just disagreeing and voicing their own opinions?

Resume the discussion with a rule
No one can give his/her opinion until he/she has rephrased what the previous speaker said and gotten confirmation that their rephrasing is accurate

Write rephrasing model on flip—"So what you're saying is….."

Allow discussion to go for 10 more minutes and then end it

Process exercise
- How was the second half of the discussion different?
- What effect did the rephrasings have?
- Which half was more productive? Why?

Transition into feelings
Rephrasing is an excellent tool for dealing with concrete facts, such as directions. However, it is not as useful when dealing with emotional situations. There are other techniques that are better to use when dealing with highly charged situations. This next exercise will help us figure out what to do and not do when you're dealing with an emotional situation.

Eight Responses—See attached for text and worksheet
Read scenario to participants and responses 1-8 (one at a time)
Need a volunteer reader for #8

After each response, ask them to write down their thoughts about the response. Is it effective? How would they feel if someone said that to them?

Handout text and discuss their thoughts about responses 1-7. Analyze text to determine what makes each one ineffective.

Analyze response #8. How it is different from the others? How was the effect on you different? Analyze the text to find out what makes it effective. (emphasis on feelings & hopes).

Feelings & Hopes will be covered one at a time

Feelings

Large group discussion

- When I say we're going to talk about feelings, what thoughts do you have?
- Why pay attention to feelings when listening?
- Are feelings important? How so?

(Feelings are the engines that drive us. Feelings add the spice to life. We have them whether or not we choose to express them. Some examples of the power of feelings—conflict in the Middle East, pro-life vs. pro-choice, blowing our top over a trivial event. Strong feelings can overwhelm us and override our rational thoughts—ex. yelling at someone, saying cruel things and regretting it later. Explain brain's shortcut to the limbic system. Better to learn to deal with them than allow them to dictate our actions).

Four categories of feelings—glad, sad, mad, afraid

Write on flip and brainstorm additional feeling words for each category

Concentrate on words that are appropriate for the workplace

Further breakdown into two categories

Feelings we have when our hopes are mad (glad)

Feelings we have when our hopes aren't met (mad, sad, afraid)

Handout empathic communication feeling list—see attached

Discuss each feeling separately and ask the following questions

(This exercise may be shortened or skipped if time is short)

- What purpose does each feeling serve?
- What happens when we suppress each feeling?
- How can these feelings be negatively expressed?
- How can these feelings be positively expressed?

See attached Uses of Feelings chart

Model identifying feelings while listening

Ask for volunteer to talk about something he/she feels strongly about

(Volunteer should not say specifically what the feeling is)

Facilitator listens and guesses at the feelings

"It sounds like you're feeling…."

"Are you feeling……."

Class writes down observations

Discussion

What effect did guessing feelings have on the speaker?

What happened when the facilitator guessed the wrong feeling?

True feelings vs. feelings mixed with evaluations

Write the following statements on the flip

- I feel afraid vs. I feel abandoned
- I feel angry vs. I feel attacked
- I feel sad vs. I feel misunderstood

Discussion

- How are the statements on the left different from those on the right?
- How would you feel if you heard each one?

(Statements on the right are feelings mixed with evaluations. They imply that the other person's actions intentionally caused the speaker's feelings. They judge the other person's actions.).

Handout Empathic Curriculum handout on "non-feelings"—see attached

Review some of the non-feeling words. What true feeling is hiding beneath

the non-feeling?

Practice identifying feelings

Divide group into pairs

Speaker talks about a subject he/she feels strongly about (without directly stating his/her feelings)

Listener guesses at feeling

"It sounds like you're feeling….."

"Are you feeling…."

(Listener may also rephrase and ask questions, but minimally)

Switch roles

Process in large group

Was it easy or difficult to identify the speaker's feeling?

What effect did it have on the speaker?

Value of identifying feelings

Discussion

How could you use this skill as a supervisor?

What are some situations where this technique would be useful?

Reflection (10-15 minutes)

Purpose: to give participants the opportunity to recognize, discuss and write about what they learned in class

Each class, participants discuss and record learnings in a journal

Sample questions

What did you learn today?

What do you want to remember from today's class?

What did you like/dislike?

How can you use what you learned today?

SUPERVISION BASICS

Session #7

Objectives

Define what a hope is, be able to link feelings to hopes, identify feelings & hopes in another person's speech

Materials Needed

Flip chart, markers, tape

Agenda

Check-in
Review Objectives & Agenda
Listening Skills—hopes
Reflection

Description of Activities

<u>*Check-in*</u> (5-7 minutes)

Purpose: to find out participants' state of mind, to help participants get mentally ready for class

Ask participants to rate their mood on a scale of 1-10 (10 high, 1 low)

<u>*Review Objectives, Agenda*</u> (2-5 minutes)

Purpose: to preview class content for participants, so they know what to expect

<u>*Listening Skills*</u> (1 ½ - 1 ¾ hours)

Purpose: to have participants know what a hope is and is not, to use the "because I" clause to link feelings to hopes, to practice identifying the unspoken feelings & hopes in another person's speech, to recognize the value of the feeling & hope listening technique

Review previous class—rephrasing & feelings

Refer to "8 Responses" Exercise—Response #8

"Would you rather have been spoken to more respectfully?"—write on flip

Discussion

- What kind of statement is this? (hope, what the speaker wants)
- Did the speaker say this directly? (no)
- How did the listener figure this out? (guessed)

Define hope

Positive things we want for ourselves and others

Hopes are <u>not</u> what we want others to do—that's a request

Not "I hoped you'd be on time to the meeting" but rather "I hoped to start the meeting on time with everyone present"

Hopes are usually unspoken

Compare rephrasing and identifying hopes

What's the difference between rephrasing and hopes?

Rephrasing is what the speaker said, in different words

Hope is what the person means, but didn't say

Phrasing hopes

Create a scenario for the class

Imagine our class is meeting on your day off. All day, you've been home relaxing, having fun. Now you've come to class. It is time for class to start, but the teacher hasn't yet arrived. You wait and wait, but she doesn't show up. After 30 minutes, you go home.

Now imagine you are at the class after the one where the teacher didn't show up. What do you have to say to her? (Write responses on flip).

Now imagine the teacher is listening to you. She says two statements. What are the differences? Which is more effective? (Write statements on flip).

Are you feeling frustrated because I wasn't here?

Are you feeling frustrated because you wanted to spend your day off time productively?

The first statement implies that the teacher's actions caused the feeling of frustration. The second statement acknowledges that the unmet hope of using time productively was what caused the feeling of frustration. Discuss this difference.

Handout hopes list and discuss

Note how general and positive they are

Brainstorm work-related hopes

What do employees hope for?

What do supervisors hope for?

What does the company hope for?

Discussion—guessing at hopes

Refer to "8 Responses"

Note that the listener guessed the wrong hope and the speaker corrected him/her. Stress that it's ok to be wrong. The attempt is what's important, and it will help the speaker identify their true hope.

Practice identifying hopes

Write model on flip

"Are you feeling……because you hoped……"

Facilitator relates personal experience

Participants guess at feelings and hopes using the model

Break group into pairs for practice—do several rounds with different partners

Process practice after each round

What went well?

What was difficult?

What effect does this kind of listening have on the speaker?

Does it get easier the more you practice?

In what kinds of supervisory situations would this be helpful?

Reflection (10-15 minutes)

Purpose: to give participants the opportunity to recognize, discuss and write about what they learned in class

Each class, participants discuss and record learnings in a journal

Sample questions

What did you learn today?

What do you want to remember from today's class?

What did you like/dislike?

How can you use what you learned today?

SUPERVISION BASICS SECTION #4

Feedback

Sessions 8-11

Major Objectives:

Participants will recognize the importance of feedback

Participants will know the principles and components of effective feedback

Participants will recognize appropriate styles of giving feedback

Participants will be able to give oral and written feedback

Major Activities:

What's Important to Employees Exercise

Role Plays—Principles & Components of Effective Feedback

Facts vs. Evaluations

Feedback Practice—verbal and written

SUPERVISION BASICS

Session #8

Objectives

Understand the importance of feedback, identify and explain the principles of effective feedback

Materials Needed

Flip chart, markers, tape

Agenda

Check-in
Review Objectives & Agenda
Review Supervision Questions—assessment of learning
Listening Practice—feelings & hopes
Feedback
    Importance of feedback
    Principles of effective feedback
Reflection

Description of Activities

Check-in (5-7 minutes)

Purpose: to find out participants' state of mind, to help participants get mentally ready for class

Ask participants to rate their mood on a scale of 1-10 (10 high, 1 low)

Review Objectives, Agenda (2-5 minutes)

Purpose: to preview class content for participants, so they know what to expect

Review Supervision Questions (10-15 minutes)

Purpose: to review supervision questions developed at the beginning of the course, to see how the content covered so far relates to answering those questions

Where do we stand in answering our questions?
How can listening skills be used?

Listening Practice—feelings & hopes (15-20 minutes)

Purpose: to give participants an opportunity to practice and become more comfortable with listening for feelings & hopes

Divide group into pairs—speaker & listener
- Speaker talks about a subject he/she feels strongly about
- Listener guesses at feelings & hopes

Switch roles

Process listening
- What went well?
- What was difficult?
- Is it getting easier to guess at feelings & hopes?

Feedback (50-60 minutes)

Purpose: to show participants how crucial feedback is to employees, to determine the principles of effective feedback

Importance of feedback
- Give participants the "What's important to employees?" handout—see attached

Explain and ask participants to complete handout individually
- Stress that rankings should be based on what they believe is important to employees, not to them personally

Discussion
- What did you rank as number 1? What was your reasoning?
- What did you rank as number 2? What was your reasoning?
- What did you rank as number 3? What was your reasoning?

Distribute "Supervisor & employee ranking of rewards" handout—see attached

Explain background of the information—See attached article

1994 study of 1000 employees & supervisors

Each ranked rewards—what's important to employees?

Same study was completed in 1981 & 1946

Employee rankings have changed, but supervisors haven't

Point out that rankings #2 & 3 are related to feedback

Discuss rankings

- Are you surprised?
- What implications does this have for supervision?
- What kind of feedback could you give employees so they feel appreciated and in on things?

Principles of Effective Feedback

Role play---giving negative feedback in a negative way

Scenario—Facilitator is the supervisor at a department meeting

See attached for sample role play

Discuss role play—Write responses to questions on flip

- What did you think of the way I delivered the feedback?
- What did I do specifically?
- Why is this way of delivering feedback ineffective?

Role play—giving negative feedback in a positive way

Ask a participant to read the employee role

Scenario—Facilitator is a supervisor talking with an employee in private

See attached for sample role play

Discuss role play—Write responses to questions on flip

- What did you think of the way I delivered the feedback?
- What did I do specifically?
- Why is this way of delivering feedback effective?

Develop principles of effective feedback—write on flip

Handout text of the two role plays—analyze

Use information from the two role plays to develop principles

Important principles to include: intended to help, sincere, includes facts not evaluations, timely, 2-way, specific, includes clear examples, about something the employee can fix, not more than the employee can handle, given at an appropriate time.

Type up and handout principles at the next class

Reflection (10-15 minutes)

Purpose: to give participants the opportunity to recognize, discuss and write about what they learned in class

Each class, participants discuss and record learnings in a journal

Sample questions

What did you learn today?

What do you want to remember from today's class?

What did you like/dislike?

How can you use what you learned today?

SUPERVISION BASICS

Session #9

Objectives

Identify the parts of feedback, distinguish between a fact and evaluation, know resources available to determine facts

Materials Needed

Flip chart, markers, tape

Agenda

Check-in
Review Objectives & Agenda
Listening Practice—feelings & hopes
Feedback
- Parts/components of feedback
- Facts vs. Evaluations
- Determining the facts—asking questions

Identify Practice Situations
Reflection

Description of Activities

<u>*Check-in*</u> (5-7 minutes)

Purpose: to find out participants' state of mind, to help participants get mentally ready for class

Ask participants to rate their mood on a scale of 1-10 (10 high, 1 low)

<u>*Review Objectives, Agenda*</u> (2-5 minutes)

Purpose: to preview class content for participants, so they know what to expect

Listening Practice—feelings & hopes (15-20 minutes)

Purpose: to give participants an opportunity to practice and become more comfortable with listening for feelings & hopes

Divide group into pairs—speaker & listener

Speaker talks about a subject he/she feels strongly about

Listener guesses at feelings & hopes

Switch roles

Process listening

What went well?

What was difficult?

Is it getting easier to guess at feelings & hopes?

Feedback (1-1 ½ hours)

Purpose: to identify the important pieces of information to include in a feedback session, recognize the importance of facts in feedback, to distinguish between facts and evaluations

Components of feedback

Principles of feedback dealt with how to give feedback; components begins to identify what to include in a feedback session

Roleplay (same scenario as in session #9)

Review scenario

It is now 2 weeks later and production is still down

Supervisor calls employee into office to talk

Run roleplay with a volunteer—see attached sample text

During role play participants write down parts of feedback

What kind of information was included?

Handout & read roleplay

Reflection (10-15 minutes)

Purpose: to give participants the opportunity to recognize, discuss and write about what they learned in class

Each class, participants discuss and record learnings in a journal

Sample questions

What did you learn today?

What do you want to remember from today's class?

What did you like/dislike?

How can you use what you learned today?

WHAT'S IMPORTANT TO EMPLOYEES?

Survey results from 1994 study of 1000 employees & supervisors

SUPERVISORS' RANKING OF REWARDS

1. Good wages
2. Job security
3. Promotion & growth in the organization
4. Good working conditions
5. Interesting work
6. Personal loyalty to employees
7. Tactful discipline
8. Full appreciation of work done
9. Sympathetic help with personal problems
10. A feeling of being in on things

EMPLOYEES' RANKING OF REWARDS

1. Interesting work
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9. Tactful discipline
10. Sympathetic help with personal problems

Source: Training & Development, July 1995, p. 59-60

SUPERVISION BASICS

Session #10

Objectives

Be able to use questions to determine the facts of a situation, be able to write a written feedback sheet including the components of effective feedback, be able to deliver verbal feedback according to the principles & components of effective feedback

Materials Needed

Flip chart, markers, tape

Agenda

Check-in
Review Objectives & Agenda
Listening Practice—feelings & hopes
Feedback Practice
Reflection

Description of Activities

Check-in (5-7 minutes)

Purpose: to find out participants' state of mind, to help participants get mentally ready for class

Ask participants to rate their mood on a scale of 1-10 (10 high, 1 low)

Review Objectives, Agenda (2-5 minutes)

Purpose: to preview class content for participants, so they know what to expect

Listening Practice—feelings & hopes (15-20 minutes)

Purpose: to give participants an opportunity to practice and become more comfortable with listening for feelings & hopes

Divide group into pairs—speaker & listener
- Speaker talks about a subject he/she feels strongly about
- Listener guesses at feelings & hopes

Switch roles

Process listening
- What went well?
- What was difficult?
- Is it getting easier to guess at feelings & hopes?

Feedback Practice (1-1 ½ hours)

Purpose: to model the written and verbal feedback process for participants, to help participants recognize the importance of preparing for a feedback session, to give participants the opportunity to practice written and verbal feedback skills

Group practice
- Handout feedback worksheet—see attached

- Group chooses a negative feedback situation to work through together

- Brainstorm questions to ask to get the facts of the situation
  - What would they ask?
  - Who would they ask?

  - Discussion
    - Why is it important to ask so many questions?
      - Generate lots of information, get a well-rounded picture of the situation, test your assumptions about the cause of the problem

- Fill out worksheet questions one by one as a large group

- Use worksheet to fill out discipline form—see attached American Tool sample

- Facilitator models using the worksheet to deliver feedback to an employee
  - Ask for volunteer to play the part of the employee

List components of feedback—write on flip

What are the parts of a feedback session?

What information is important to include?

Important components to include—Describe the facts of the situation; Discuss the effect the behavior has on the supervisor, company, other employees, production; Outline how the action met, exceeded or fell below expectations; ask questions; Explain your feelings & hopes about the situation; Explain the consequences if the employee fails to meet expectations; Make a specific, doable request of the employee.

Does all this information need to be included each time?

How will it differ with positive & negative feedback?

Type up and handout components at next class

Facts vs. evaluations

One of the important components of feedback was describing the situation. But how do you describe the situation?

Handout & complete "Feedback, What's your preference"--See attached

For each pair, one statement is a fact and one is an evaluation.

Discussion

- Which statements did you prefer? Why?
- How are each a & b different from each other?
- How would you react to each one?
- Which is more effective? Why?
- Why is it important to avoid evaluations when giving an employee feedback?

Determining the facts

What is the best way to go about finding the facts?

What resources do you have?

Brainstorm

Resources include own observation, employee observations, reports, other supervisors, human resources, personnel files

Identify Practice Situations (15-20 minutes)

Purpose: to identify company specific situations that participants can use to practice feedback skills

Brainstorm situations where a supervisor would have to give an employee positive or negative feedback. (Alternate questions-- what could employees do wrong, what could they do right)

Class will use these situations to practice feedback skills during next 2 classes

Reflection (10-15 minutes)

Purpose: to give participants the opportunity to recognize, discuss and write about what they learned in class

Each class, participants discuss and record learnings in a journal

Sample questions

What did you learn today?
What do you want to remember from today's class?
What did you like/dislike?
How can you use what you learned today?

FEEDBACK ROLE PLAYS #1 & 2

Role play—giving negative feedback in a negative way

Scenario—supervisor is leading a department meeting

Supervisor—"Thank you all for coming to this meeting. I've called us all together because production is really down this month and I'm catching hell for it. Most of you are really working hard, with a few exceptions. You (point at an empty chair) are really screwing up. Whenever I walk by the area you seem to be working hard, but I've been told by reliable sources that you only do that when I'm around. After I leave, you kick back and talk and laugh. I'm not paying you to laugh! Also, it seems that your machine breaks down a lot. I think you're sabotaging it so you don't have to work. I'm tired of seeing everyone else work their tails off just to cover your incompetence. So what do you have to say for yourself?"

Role play—giving negative feedback in a positive way

Scenario—Supervisor is talking with an employee in private

Supervisor—"Thanks for coming in. I've asked you to come and see me so we can discuss the department's production goals. As you know from the department meeting, production is down by 15%. I've been reviewing the whole department's productivity, and I noticed that you haven't met your production goal for three out of the last four weeks. I'm really concerned, because I want our department to meet its goals. Is there anything that's preventing you from reaching your production goals?"

Employee—"Yes, it's the damn machine. It keeps breaking down. I have fixed it several times, but it just keeps running slower and slower. There's no way I can meet my goals with that piece of junk."

Supervisor—"It sounds like your really frustrated because you want to meet your goals just as much as I do. Tell you what, let's go over to your machine and see if the two of us can figure out what's making it malfunction. If we can't figure it out, we'll call maintenance. I'm really glad we talked about this. To prevent this kind of situation from happening again, would you make sure to keep me informed about how your machine is working? If it breaks, call me. I can't fix problems I don't know about."

SUPERVISION BASICS

Session #11

Objectives

Be able to write a written feedback sheet including the components of effective feedback, be able to deliver verbal feedback according to the principles & components of effective feedback

Materials Needed

Flip chart, markers, tape

Agenda

Check-in
Review Objectives & Agenda
Listening Practice—feelings & hopes
Feedback Practice
Reflection

Description of Activities

<u>*Check-in*</u> (5-7 minutes)

Purpose: to find out participants' state of mind, to help participants get mentally ready for class

Ask participants to rate their mood on a scale of 1-10 (10 high, 1 low)

<u>*Review Objectives, Agenda*</u> (2-5 minutes)

Purpose: to preview class content for participants, so they know what to expect

Listening Practice—feelings & hopes (15-20 minutes)

Purpose: to give participants an opportunity to practice and become more comfortable with listening for feelings & hopes

Divide group into pairs—speaker & listener
- Speaker talks about a subject he/she feels strongly about
- Listener guesses at feelings & hopes

Switch roles

Process listening
- What went well?
- What was difficult?
- Is it getting easier to guess at feelings & hopes?

Feedback Practice (1-1 ½ hours)

Purpose: to give participants additional time to practice feedback skills, to help participants recognize their own strengths and weaknesses when giving feedback

Individual practice
- Each participant chooses a situation to work on
  - Everyone should practice at least one positive & one negative situation
- Participants fill out the feedback worksheet
- Participants fill out discipline form
- Review feedback & discipline forms with a partner
  - Is it written in complete sentences?
  - Are there only facts, no evaluations?
  - Is everything clear?
  - Anything missing?
- Review discipline forms in the large group
  - Each participant reads his/hers aloud to the group
  - Group gives feedback on four questions above
- Practice verbal feedback with same partner
- Practice verbal feedback with facilitator in front of large group
  - Facilitator or a volunteer class member plays off the participant
  - Group gives feedback

Individual practice

Each participant chooses a negative situation to work on

Participants fill out the feedback worksheet

Participants fill out discipline form

Review feedback & discipline forms with a partner

Is it written in complete sentences?
Are there only facts, no evaluations?
Is everything clear?
Anything missing?

Review discipline forms in the large group

Each participant reads his/hers aloud to the group
Group gives feedback on four questions above

Practice verbal feedback with same partner

Practice verbal feedback with facilitator in front of large group

Facilitator or a volunteer class member plays off the participant
Group gives feedback

Repeat process with a positive feedback example (if time)

This will be continued in Session #12

<u>*Reflection*</u> (10-15 minutes)

Purpose: to give participants the opportunity to recognize, discuss and write about what they learned in class

Each class, participants discuss and record learnings in a journal

Sample questions

What did you learn today?
What do you want to remember from today's class?
What did you like/dislike?
How can you use what you learned today?

SUPERVISION BASICS SECTION #5

Meetings

Sessions 12-16

Major Objectives:

Participants will be able to identify the types & purposes of meetings, such as information gathering, decision making and reporting out

Participants will recognize the importance of meeting processes & functions such as building agendas, using warm-ups, creating norms and identifying different decision making styles

Participants will participate effectively in meetings by practicing the roles of facilitator, minute-taker, scribe and participant

Participants will learn how to deal with difficult meeting behaviors

Major Activities:

Advantages & Disadvantages of Meetings

Dealing with Dysfunctional Behaviors

Decision Making in Meetings

Meeting Roles—Facilitator, Participant, Minute-taker

Meeting Practice

SUPERVISION BASICS

Session #12

Objectives

Recognize purposes, advantages & disadvantages of meetings, recognize and deal with dysfunctional behaviors in meetings

Materials Needed

Flip chart, markers, tape

Agenda

Check-in
Review Objectives & Agenda
Review Supervision Questions
Purposes, Advantages & Disadvantages of Meetings
Dealing with Dysfunctional Behaviors
Reflection

Description of Activities

Check-in (5-7 minutes)

Purpose: to find out participants' state of mind, to help participants get mentally ready for class

Ask participants to rate their mood on a scale of 1-10 (10 high, 1 low)

Review Objectives, Agenda (2-5 minutes)

Purpose: to preview class content for participants, so they know what to expect

Review Supervision Questions (10-15 minutes)

Purpose: to review supervision questions developed at the beginning of the course, to see how the content covered so far relates to answering those questions

Where do we stand in answering our questions?
How can feedback skills be used?

Purposes, Advantages & Disadvantages of Meetings (30-40 minutes)

Purpose: to find out what kinds of meetings participants attend, to analyze the factors that make meetings succeed or fail

General Discussion about Meetings

- What kinds of meetings do you go to? (List on flip)
- How are the meetings organized and run?
- Are they productive or a waste of time? What makes them so?

Purposes of Meetings

What purpose do meetings serve? Why get together?

(Use list of meetings as a reference point)

Examples of purposes—informational, brainstorming/idea gathering problem solving, decision making, motivational, recognition

Why is it important to know the purpose of a meeting?

Purpose influences how a meeting is designed, how you prepare for it and how you participate in it

Advantages of Meetings—What are the benefits?

Brainstorm—write on flip

communicate information to a lot of people, generate lots of ideas, lots of opinions and perspectives, a group can make better decisions

Disadvantages of Meetings—What makes them unproductive? What hinders meetings?

Brainstorm—write on flip

Responses will likely fall into three categories

Personal issues—nervous about speaking in front of others, unsure how to get ideas across, won't be listened to

Other people issues—everyone talks at once, some monopolize, same people talk, some quiet, some resistant, argumentative

Structural issues—meeting gets off topic, no decisions are made, purpose of meeting unclear, meeting runs late, no agenda

Type up and handout advantages & disadvantages at the next class

Dealing with Dysfunctional Behaviors (45-60 minutes)

Purpose: to give participants the opportunity to discuss ways they would deal with difficult people in meetings, to practice meeting skills

People problems are one of the big challenges of meetings. Therefore, we're going to start there. Since this unit is dealing with meetings, most everything you do will be in a meeting format, working as a large group.

Handout "Meeting Management Work Sheet" See attached
Participants complete work sheet individually

Participants complete work sheet as a group
(Do not give them any instructions as to how to work in a group. Allow them to work it out for themselves. This will be processed in the discussion following the exercise.)

Facilitator observes group, makes notes about their process—who participates, who leads, how decisions are made

Group Discussion of the Exercise
Handout and review suggested answers
Do you agree?
Have your views on dealing with difficult behaviors changed?

Handout pages 20-24 of The Winning Trainer—see attached
More suggestions on how to deal with difficult people
Keep in mind that listening is also a useful technique

In future meetings the facilitator will join the group as a behavior problem, to give participants the opportunity to deal with the behaviors

Discuss group process
Explain process vs. product
Discussion about the subject of the exercise was product
What you did, what you produced
Now we're going to discuss how you did it—the process
Analogy—maintenance of machines
Taking machines off-line for maintenance
What happens to production short-term?
What happens to production long-term?
Looking at how the meeting functioned—process—will improve quality of meetings long term

How would you describe your participation?
More talking or more listening? Is this typical for you?
Was there a leader in your group? What did he/she do?
How did your group decide the rankings?
Did you ever disagree with the group rankings? What did you do?
What did you like/dislike about the decision making process?

Reflection (10-15 minutes)

Purpose: to give participants the opportunity to recognize, discuss and write about what they learned in class

Each class, participants discuss and record learnings in a journal

Sample questions

What did you learn today?

What do you want to remember from today's class?

What did you like/dislike?

How can you use what you learned today?

SUPERVISION BASICS

Session #13

Objectives

Be able to recognize differences and advantages/disadvantages of three different styles of decision making (autocratic, majority rule, consensus), know what an effective facilitator, participant & minute taker does, understand the importance of check-in and agendas

Materials Needed

Flip chart, markers, tape

Agenda

Check-in
Review Objectives & Agenda
Decision Making in Meetings
Meeting Roles--Facilitator, Participant, Minute-taker
Meeting Structures—Check-in, Agenda
Review
Reflection

Description of Activities

<u>*Check-in*</u> (5-7 minutes)

Purpose: to find out participants state of mind, to help participants get mentally ready for class

Ask participants to rate their mood on a scale of 1-10 (10 high, 1 low)

<u>*Review Objectives & Agenda*</u> (2-5 minutes)

Purpose: to preview class content for participants, so they know what to expect

Purposes, Advantages & Disadvantages of Meetings (30-40 minutes)

Purpose: to find out what kinds of meetings participants attend, to analyze the factors that make meetings succeed or fail

General Discussion about Meetings

- What kinds of meetings do you go to? (List on flip)
- How are the meetings organized and run?
- Are they productive or a waste of time? What makes them so?

Purposes of Meetings

What purpose do meetings serve? Why get together?

(Use list of meetings as a reference point)

Examples of purposes—informational, brainstorming/idea gathering problem solving, decision making, motivational, recognition

Why is it important to know the purpose of a meeting?

Purpose influences how a meeting is designed, how you prepare for it and how you participate in it

Advantages of Meetings—What are the benefits?

Brainstorm—write on flip

communicate information to a lot of people, generate lots of ideas, lots of opinions and perspectives, a group can make better decisions

Disadvantages of Meetings—What makes them unproductive? What hinders meetings?

Brainstorm—write on flip

Responses will likely fall into three categories

Personal issues—nervous about speaking in front of others, unsure how to get ideas across, won't be listened to

Other people issues—everyone talks at once, some monopolize, same people talk, some quiet, some resistant, argumentative

Structural issues—meeting gets off topic, no decisions are made, purpose of meeting unclear, meeting runs late, no agenda

Type up and handout advantages & disadvantages at the next class

Dealing with Dysfunctional Behaviors (45-60 minutes)

Purpose: to give participants the opportunity to discuss ways they would deal with difficult people in meetings, to practice meeting skills

People problems are one of the big challenges of meetings. Therefore, we're going to start there. Since this unit is dealing with meetings, most everything you do will be in a meeting format, working as a large group.

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Handout and review suggested answers
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Keep in mind that listening is also a useful technique

In future meetings the facilitator will join the group as a behavior problem, to give participants the opportunity to deal with the behaviors

Discuss group process
Explain process vs. product
Discussion about the subject of the exercise was product
What you did, what you produced
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Analogy—maintenance of machines
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What happens to production short-term?
What happens to production long-term?
Looking at how the meeting functioned—process—will improve quality of meetings long term

How would you describe your participation?
More talking or more listening? Is this typical for you?
Was there a leader in your group? What did he/she do?
How did your group decide the rankings?
Did you ever disagree with the group rankings? What did you do?
What did you like/dislike about the decision making process?

SUPERVISION BASICS

Session #14

Objectives

Participants will be able to effectively facilitate, participate and scribe during a meeting.

Materials Needed

Flip chart, markers, tape

Agenda

Check-in
Review Objectives & Agenda
Meeting Practice—Designing a new feedback form
Reflection

Description of Activities

Check-in (5-7 minutes)

Purpose: to find out participants state of mind, to help participants get mentally ready for class

Ask participants to rate their mood on a scale of 1-10 (10 high, 1 low)

Review Objectives & Agenda (2-5 minutes)

Purpose: to preview class content for participants, so they know what to expect

Meeting Practice—Designing a new feedback form (1 ½ - 1 ¾ hours)

Purpose: to give participants the opportunity to apply learnings from the feedback section of the curriculum, to practice the meeting skills/knowledge they have gained

Handout Meeting Scenario—see attached American Tool sample

Decision Making in Meetings (40-50 minutes)

Purpose: to have participants experience three styles of decision making in meetings--autocratic, majority rule & consensus, to identify advantages and disadvantages of each style, to determine appropriate times to use each style

Handout "Characteristics of a Good Group Leader/Facilitator sheet"—see attached

Participants complete individually

Participants share their top five characteristics—write on flip

Facilitator tells the group they will be using his/her rankings, because time is short and he/she knows better anyway (autocratic decision making)

Discussion

How do participants feel about the facilitator doing this?

Reveal that this is autocratic decision making

What are the advantages of autocratic decision making?

When would it be useful?

What are the disadvantages?

When would it not be useful?

(Capture this information on flip chart)

Facilitator creates majority rule ranking of responses

Discussion

How do participants feel about the facilitator doing this?

Reveal that this is majority rule decision making

What are the advantages of majority rule decision making?

When would it be useful?

What are the disadvantages?

When would it not be useful?

(Capture this information on flip chart)

Facilitator explains third style of decision making—consensus

Rules for consensus (write on flip)

Group must all at least partially agree on answers

i.e. You don't totally agree with an answer, but you can live with it

No majority rule or trading to reach the decision

View differences of opinions as a help rather than hindrance in the process

Group works to achieve consensus on the task (Facilitator participates in group as a minute-taker to model this skill)

Process exercise

What was easy/difficult about the consensus process?
How does consensus compare with autocratic & majority rule decision making?
What are the advantages and disadvantages of it?
When would it be helpful, not helpful?
How did your group function? Who took the role of leader?
What did I do as the minute taker? (Review minutes)
How did you deal with disagreements?
What would you do to improve your group process?

Type up and handout advantages & disadvantages at the next class

Meeting Roles—Facilitator, Participant, Minute-taker (20-30 minutes)

Purpose: to recognize the value of roles in meetings, to know what an effective facilitator, participant and minute-taker does

We've now had two relatively unstructured meetings. These can work well with small groups, or in groups where everyone feels comfortable to participate, but most meetings aren't like that. For most meetings, you need structure in order to make them productive. One component of structure is group roles. We've already talked about dysfunctional roles. Now we're going to focus on productive roles. The three we're going to concentrate on are facilitator/leader, participant and minute-taker. We're going to develop a job description for each.

Divide flip into 3 columns, write facilitator, participant, minute taker at the top of each

Brainstorm job description for each (What does each do? What doesn't each do?)

Job descriptions should include the following:

Facilitator: Keeps the group on track, follows an agenda, asks for participation, deals with conflicts & dysfunctional participants, asks questions, listens to everyone, helps the group reach consensus, summarizes the discussion

Participant: Listens, asks questions, offers ideas, suggestions, stays on topic, supports the facilitator, focuses on the issue, doesn't engage in side conversations, behaves professionally & politely

Minute-taker: Listens, writes down major points/decisions of the meeting, records date, time, attendees of meeting, asks group for clarification of points, reviews minutes with the group, supports facilitator, asks questions, asks the group if he/she has accurately recorded the action item or decision

Type up and handout the descriptions for next class

Discussion

How can having a facilitator & minute taker help a meeting?

Meeting Structure—Check-in, Agenda (20-25 minutes)

Purpose: to recognize the importance of meeting structures such as check-in and agendas

Now we're going to turn to the structure of the actual meeting itself.

Discussion

How are meetings you go to structured?
How do they start?
How do they finish?
How do we start our meetings? What do I do? Why?

Check-in, Agenda—Two important parts to include in a meeting

Discuss why they are important, what effect do they have

Review (7-10 minutes)

Purpose: to review meeting content covered so far, to prepare to put learnings into practice at the next session

What have we learned about meetings so far?

Advantages/Disadvantages, Purposes, Dysfunctional Behaviors, Decision Making, Roles of Facilitator, Participant & Minute Taker, Importance of Check-in & Agenda

Reflection (10-15 minutes)

Purpose: to give participants the opportunity to recognize, discuss and write about what they learned in class

Each class, participants discuss and record learnings in a journal

Sample questions

What did you learn today?
What do you want to remember from today's class?
What did you like/dislike?
How can you use what you learned today?

CHARACTERISTICS OF A GOOD GROUP LEADER/FACILITATOR

Instructions: Listed below are some characteristics of a good group leader/facilitator. Your task is to select the five most important characteristics and rank these from 1 (most important) to 5 (least important of the five you have selected).

_____ Is energetic

_____ Is skilled at resolving conflict

_____ Is well organized

_____ Has experience as a group leader/facilitator

_____ Is respected by group members

_____ Is reliable

_____ Is charismatic

_____ Is intelligent

_____ Is creative

_____ Possesses a sense of humor

_____ Is effective in achieving results

Source: The 1987 Annual: Developing Human Resources, p. 37.

SUPERVISION BASICS

Session #15

Objectives

Participants will be able to effectively facilitate, participate and scribe during a meeting.

Materials Needed

Flip chart, markers, tape

Agenda

Check-in
Review Objectives & Agenda
Meeting Practice—Hiring a new supervisor
Reflection

Description of Activities

Check-in (5-7 minutes)

Purpose: to find out participants' state of mind, to help participants get mentally ready for class

Ask participants to rate their mood on a scale of 1-10 (10 high, 1 low)

Review Objectives & Agenda (2-5 minutes)

Purpose: to preview class content for participants, so they know what to expect

Meeting Practice—Hiring a new supervisor (1 ½ - 1 ¾ hours)

Purpose: to have participants use the meeting skills/knowledge they have learned, to familiarize participants with the hiring process

This meeting will take two full class sessions

Handout Meeting Scenario—see attached American Tool sample

Decide who will be the facilitator & minute taker—review job descriptions
These roles will be rotated during the meeting

Allow 10-15 minutes for participants to re-read the scenario and prepare for the meeting

Discussion—How should this meeting be organized?
Do you need an agenda? What should it include?

Allow the group to form its own agenda—sample attached

Turn meeting over to the designated facilitator
(During the meeting the teacher plays a "dysfunctional" group member to give the group a chance to respond to those kinds of behaviors. The teacher should also take notes about the group process.)

Periodically rotate facilitator & minute taker roles

Periodically stop the group and process the meeting (especially if they are stuck)
What's going well in the meeting?
What's not going so well?
What dysfunctional behavior is the teacher exhibiting?
How is the group dealing with that behavior?
What would make the meeting run smoother?

Process the meeting at the end
What did you learn?
What would you do differently next time?
What was it like to be the facilitator, the minute taker?
How did you feel about the teacher's dysfunctional behavior?

Reflection (10-15 minutes)
Purpose: to give participants the opportunity to recognize, discuss and write about what they learned in class

Each class, participants discuss and record learnings in a journal
Sample questions
What did you learn today?
What do you want to remember from today's class?
What did you like/dislike?
How can you use what you learned today?

MEETING SCENARIO #1

Attached is the form American Tool currently uses to record disciplinary action against an employee. The company has decided to revise the form. You are the group of supervisors who have been asked to make the changes. You have full authority to make any revisions you believe are necessary. The company requests that you include space for positive as well as negative feedback on the form. As you discuss the changes to make, feel free to refer to what you have learned about the principles and components of effective feedback. You must use the consensus method to reach decisions.

Suggested agenda for meeting scenario #1

Check-in

Review what you learned during the feedback section of this class

Decide what you like about the form

Decide what you don't like about the form

Decide how you would change what you don't like

Revise the form

Review minutes for accuracy

SUPERVISION BASICS

Session #16

Objectives

Participants will be able to effectively facilitate, participate and scribe during a meeting.

Materials Needed

Flip chart, markers, tape

Agenda

Check-in
Review Objectives & Agenda
Meeting Practice—Hiring a new supervisor—Continued
Reflection

Description of Activities

Check-in (5-7 minutes)

Purpose: to find out participants' state of mind, to help participants get mentally ready for class

Ask participants to rate their mood on a scale of 1-10 (10 high, 1 low)

Review Objectives & Agenda (2-5 minutes)

Purpose: to preview class content for participants, so they know what to expect

Meeting Practice—Hiring a new supervisor—Continued (1 ½ - 1 ¾ hours)

Purpose: to have participants use the meeting skills/knowledge they have learned, to familiarize participants with the hiring process

See session #16 for complete description of this exercise

Decide who will be the facilitator & minute taker—review job descriptions
These roles will be rotated during the meeting

Allow 10-15 minutes for participants to re-read the scenario and prepare for the meeting

Discussion—How should this meeting be organized?
Do you need an agenda? What should it include?

Assist the group in forming an agenda—sample agenda is attached

Turn meeting over to the designated facilitator
(During the meeting the facilitator should play the role of a "dysfunctional" group member to give the group a chance to respond to those kinds of behaviors. The teacher should also take notes about the group process.)

Periodically rotate facilitator & minute taker roles

Periodically stop the group and process the meeting (especially if they are stuck)
What's going well in the meeting?
What's not going so well?
What dysfunctional behavior is the teacher exhibiting?
How is the group dealing with that behavior?
What would make the meeting run smoother?

Process the meeting at the end
What did you learn?
What would you do differently next time?
What was it like to be the facilitator, the minute taker?
How did you feel about the teacher's dysfunctional behavior?

Reflection (10-15 minutes)
Purpose: to give participants the opportunity to recognize, discuss and write about what they learned in class

Each class, participants discuss and record learnings in a journal
Sample questions
What did you learn today?
What do you want to remember from today's class?
What did you like/dislike?
How can you use what you learned today?

MEETING SCENARIO #2

American Tool has decided to hire a new supervisor. The company has also decided to allow current supervisors to direct the hiring process, since those who do the job are best qualified to decide what is needed. You are the hiring committee. You have three tasks. The first is to decide what qualifications the person must possess in order to be a supervisor at American Tool. How much education? What kind of degree(s)? How many years of experience should the person have? What kind of experience should it be? What personality traits should the person possess? Your second task is to decide what questions to ask during the interview. There must be at least 10 questions, but no more than 20. The questions should be designed so you can determine if a person meets the qualifications you have set. A human resource representative will be available to ensure that all the questions are legal. The questions must be written as complete sentences. Lastly, you must decide the order of the questions. They should flow logically from one to the next.

Before you begin the task, create an agenda for the group to follow.

Suggested agenda for meeting scenario #2

Check-in

Determine Qualifications
- Education
- Experience
- Personality

Determine Interview Questions

Determine Order of Interview Questions

Review minutes for accuracy

SUPERVISION BASICS SECTION #6

Motivating

Sessions 17-18

Major Objectives:

Participants will be familiar with three classic theories of motivation

Participants will be able to apply motivation theories to their own workplace

Participants will be able to express educated opinions about the value of motivational theories

Major Activities:

Motivation Theories

Motivation Meeting

SUPERVISION BASICS

Session #17

Objectives

Participants will be able to explain the major points of three theories of employee motivation

Materials Needed

Flip chart, markers, tape

Agenda

Check-in
Review Objectives & Agenda
Review Supervision Questions
Employee Motivation
    Brief History of Labor
    Three Motivation Theories
Reflection

Description of Activities

Check-in (5-7 minutes)

Purpose: to find out participants' state of mind, to help participants get mentally ready for class

Ask participants to rate their mood on a scale of 1-10 (10 high, 1 low)

Review Objectives & Agenda (2-5 minutes)

Purpose: to preview class content for participants, so they know what to expect

Review Supervision Questions (10-15 minutes)

Purpose: to review supervision questions developed at the beginning of the course, to see how the content covered so far relates to answering those questions

Where do we stand in answering our questions? How can meeting skills be used?

Review progress from last meeting
    What decisions were made? What's left to do?
Decide who will be the facilitator & minute taker
    These roles will be rotated during the meeting

Turn meeting over to the designated facilitator
    (During the meeting the teacher plays a "dysfunctional" group member to give the group a chance to respond to those kinds of behaviors. The teacher should also take notes about the group process.)

Periodically rotate facilitator & minute taker roles

Periodically stop the group and process the meeting (especially if they are stuck)
    What's going well in the meeting?
    What's not going so well?
    What dysfunctional behavior is the teacher exhibiting?
    How is the group dealing with that behavior?
    What would make the meeting run smoother?

Process the meeting at the end
    What did you learn?
    What would you do differently next time?
    What was it like to be the facilitator, the minute taker?
    How did you feel about the teacher's dysfunctional behavior?
    What would you like to do with your product?

Reflection (10-15 minutes)
Purpose: to give participants the opportunity to recognize, discuss and write about what they learned in class

Each class, participants discuss and record learnings in a journal
    Sample questions
        What did you learn today?
        What do you want to remember from today's class?
        What did you like/dislike?
        How can you use what you learned today?

SUPERVISION BASICS

Session #18

Objectives

Participants will be able to use employee motivation theories to develop specific, doable motivational ideas

Materials Needed

Flip chart, markers, tape

Agenda

Check-in
Review Objectives & Agenda
Employee Motivation Meeting
Reflection

Description of Activities

Check-in (5-7 minutes)

Purpose: to find out participants' state of mind, to help participants get mentally ready for class

Ask participants to rate their mood on a scale of 1-10 (10 high, 1 low)

Review Objectives & Agenda (2-5 minutes)

Purpose: to preview class content for participants, so they know what to expect

Employee Motivation Meeting (1 ½ - 1 ¾ hours)

Purpose: to apply motivational theories, to practice meeting skills

Review motivational theories from session #18

Handout meeting scenario—see attached sample from American Tool

Employee Motivation (1 ½ - 1 ¾ hours)

Purpose: to find out what motivational practices are used at the company, to show how the history of labor relates to current company practices, to introduce motivational theories, to show participants how those theories relate to current company practices

Discussion (list answers on flip)

Why is motivation an important topic to discuss?
Where does motivation come from? (internal or external sources)
What does a motivated employee do?
What happens when employees are motivated? (advantages)
What happens when employees are not motivated? (disadvantages)
What are some of the ways this company motivates employees?
What are some of the ways supervisors motivate employees?
How well do these approaches work?
What do these motivational approaches say about what the company values?

Exercises—these are done now but discussed later

#1—Think about a time when you were performing your job really well. Describe briefly what you were doing and what factors accounted for your performance. What led you to do so well?

#2—Complete this sentence. The average employee is_____.

Brief History of Labor—The history behind production

Discussion

Ask participants to describe how the production floor is set up, how jobs are structured, how tasks are broken down how decisions are made

Why is it set up that way?

(Some of the answers can be found in the history of labor, work)

History of Work

Through most of our history, work was done by individual craftsman. If your father was a blacksmith or a carpenter or a farmer, so were you. Work was done by hand, often by one person who saw the process through from start to finish. Each piece was unique. Because of all the craftsmanship and labor, costs were high.

Mid-late 19th century. Industrial Revolution. Products were machine made to be all the same. Costs were lower. Tasks were divided so that each person did just a small part of the job. With so many people doing parts of the work, you needed managers to oversee the process.

Approx. 100 years ago—Frederick Taylor, "Scientific Management". Paid a lot of attention to how to get the most production possible. His idea was to break tasks down into the smallest possible subtask that would be repeated over and over again. Man as machine. Division of labor. Brawn not brains were required to do this kind of work. Managers job was to plan, organize, control & direct the work. Abuses in this system led to the beginning of organized labor.

Discussion

What would supervisors use to motivate employees in this system?
What are the advantages and disadvantages of this system?
How has work changed? How has it stayed the same?

Motivation Theories

After Taylorism & the Labor Movement, people began to realize that people were not machines. Their was more to motivation than just the stick. From the 1940's onward, more attention was paid to the subject of motivation. There are no definitive answers, no one right way. Motivation is too complex a subject to be reduced to one answer. We're going to discuss three of the classic (and still valid) theories of employee motivation.

Handout "Motivation Theories"—see attached

Discuss Theory X & Theory Y

What do you think of these theories?
Which one do you like better and why?
Refer to Exercise #2—do answers relate to theory x or y?
Which one fits your personal belief, style?
How do company practices influence workers' behaviors?
How do you arrange conditions for employees to achieve own goals?
Which one does this company subscribe to? How do you know?
Which company policies fit each theory?
How can you use this as a supervisor?

Discuss Motivation-Hygiene Theory

What do you think of this theory?
How do the motivators relate to the feedback exercise "What's important to employees"?
Refer to Exercise #1--Do any of the motivators relate?
Which category do company motivators fall into?
How can you use this information as a supervisor?

Discuss Hierarchy of Needs

What do you think of this theory?

How is it different from the other two? (recognizes that motivations are person specific. What motivates one may not another).

What level are most company employees on? What implications does this have for the organization?

What can an organization do to help people move up the levels?

How can you use this information as a supervisor?

<u>*Reflection*</u> (10-15 minutes)

Purpose: to give participants the opportunity to recognize, discuss and write about what they learned in class

Each class, participants discuss and record learnings in a journal

Sample questions

What did you learn today?

What do you want to remember from today's class?

What did you like/dislike?

How can you use what you learned today?

MOTIVATION THEORIES

(A brief sampler)

Douglas McGregor — Theory X and Theory Y

McGregor offers two contrasting theories of management and motivation

Theory X—Conventional view of employee motivation. A supervisor who believes in Theory X sees the average person as self-centered, inclined to be lazy, would rather be led than take responsibility, resistant to change & indifferent to organizational needs. Therefore, management must direct and control employees through persuasion, rewards and punishment.

Theory Y—A supervisor who believes in Theory Y assumes that people are not passive and uninterested in organizational needs. They become this way through their experiences in organizations. Workers have the potential for development and the willingness to accept responsibility. Their needs for achievement, for using their skills, for belongingness and acceptance exist naturally. People will set goals to fulfill these needs when conditions are right. Management's job is to arrange conditions so employees can achieve their own goals by working toward organizational objectives.

Frederick Herzberg — Motivation-Hygiene Theory

Herzberg divides employee morale into two sets of factors—dissatisfiers and motivators.

Dissatisfiers—These include company policy & administration, supervision, relationship with supervisor, working conditions, salary, relationships with peers, personal life, relationships with subordinates, status & security. If these things are not good, employees will be unhappy. However, if they are good, they will **not** necessarily make an employee happy and motivated. When these things are done well, it simply means that the employee is not unhappy.

Motivators—These include achievement, recognition, the nature of the work itself, responsibility and opportunities for advancement and growth. Jobs that include these things motivate employees and make them want to work.

Abraham Maslow Hierarchy of Needs

Maslow theorized that employee needs and motivations follow a hierarchy, progressing from one level to the next. Until lower level needs are satisfied, an individual will be unconcerned about higher level needs. An employees motivation lies at whichever level he/she is on.

Self Actualization/Self-Fulfillment Needs
Realizing one's full potential, creativity, self-development

Esteem/Ego Needs
Self esteem: use of ones skills, achievement, confidence, autonomy, independence, self-direction
Reputation: status, recognition, appreciation from others

Love/Social Needs
Acceptance by others, association & communication with others, being part of a group, feeling of belonging

Safety Needs
Protection against threat of harsh supervision or unsafe working environment, getting fair treatment from management, job security, having a predictable work environment, predictable fellow workers

Physiological Needs
Good comfortable working conditions, good pay

Source: Lau & Shani, Behavior in Organizations, 4th Edition, pp 183-195.

SUPERVISION BASICS SECTION #7

Delegating

Sessions 19

Major Objectives:

Participants will know the definition of delegation

Participants will be able to determine appropriate tasks to delegate

Participants will know and be able to use procedures for successful delegation

Major Activities:

Benefits and Risks of Delegation

Do's and Don'ts of Delegation

Components of Effective Delegation

Delegation Practice

SUPERVISION BASICS

Session #19

Objectives

Participants will be able to explain the benefits of delegating. Participants will be able to choose appropriate tasks to delegate. Participants will be able to identify and use important components to include when delegating.

Materials Needed

Flip chart, markers, tape

Agenda

Check-in
Review Objectives & Agenda
Review Supervision Questions
Delegation
- What is delegation?
- Why should supervisors delegate?
- Why don't supervisors delegate?
- What kinds of tasks should supervisors delegate?
- How should tasks be delegated?

Reflection

Description of Activities

<u>*Check-in*</u> (5-7 minutes)

Purpose: to find out participants' state of mind, to help participants get mentally ready for class

Ask participants to rate their mood on a scale of 1-10 (10 high, 1 low)

<u>*Review Objectives & Agenda*</u> (2-5 minutes)

Purpose: to preview class content for participants, so they know what to expect

Decide on a facilitator, minute-taker, agenda

Hold meeting

Process meeting

- How do your ideas relate to the motivation theories?
- What do you want to do with these ideas?
- What went well in the meeting?
- What could have gone smoother?

Reflection (10-15 minutes)

Purpose: to give participants the opportunity to recognize, discuss and write about what they learned in class

Each class, participants discuss and record learnings in a journal

Sample questions

- What did you learn today?
- What do you want to remember from today's class?
- What did you like/dislike?
- How can you use what you learned today?

EMPLOYEE MOTIVATION MEETING

As a result of this class, you are now American Tool's in-house experts on employee motivation. You are the committee designated to come up with new ways to motivate employees. Your task is to come up with at least 10 ideas that are doable and in-line with the theories we discussed. Do not list any ideas that American Tool already uses.

SUPERVISION BASICS SECTION #8

Business Writing

Sessions 20-21

Major Objectives:

Participants will be able to identify characteristics of effective business writing

Participants will know formats for memos and business letters

Participants will be able to follow examples of proper format and style

Major Activities:

The Writing Process

Characteristics of Effective Business Writing

Business Writing Forms—letters & memos

Business Writing Practice

SUPERVISION BASICS

Session #20

Objectives

Participants will know the stages of the writing process, the characteristics of effective business writing & the standard forms of business letters & memos

Materials Needed

Flip chart, markers, tape

Agenda

Check-in
Review Objectives & Agenda
Review Supervision Questions
The Writing Process
    Organizing, Drafting, Revising, Editing
Characteristics of Effective Business Writing
Business Writing Forms—memos & letters
Reflection

Description of Activities

Check-in (5-7 minutes)

Purpose: to find out participants' state of mind, to help participants get mentally ready for class

Ask participants to rate their mood on a scale of 1-10 (10 high, 1 low)

Review Objectives & Agenda (2-5 minutes)

Purpose: to preview class content for participants, so they know what to expect

Review Supervision Questions (10-15 minutes)

Purpose: to review supervision questions developed at the beginning of the course, to see how the content covered so far relates to answering those questions

Where do we stand in answering our questions?
How can delegation skills be used?

The Writing Process (25-30 minutes)

Purpose: to familiarize participants with the writing process, to show participants that following a process can be useful when writing

Discussion

What do you do when you have to write something?
Do you follow a process? What is it?
What do you know about the writing process

Explain each step of writing process—organizing, drafting, revising, editing

Stress that these are not lock steps– just guidelines to help writing

Use Writing Stages handout as a model—see attached

Organizing--Review mindmapping—useful tool to organize thoughts

Drafting--Do not edit ideas, don't worry about spelling, punctuation

Revising--Getting clearer about your ideas, write in full sentences, adding ideas, deleting

unnecessary text, moving text around

Editing--Getting piece ready for the reader—check spelling, punctuation—mechanics

Characteristics of Effective Business Writing (1 - 1 ½ hours)

Purpose: to show participants the differences between ineffective and effective business writing, to identify the components that make writing effective

Handout Business Writing Samples—see attached

Review each "poor" and "better" sample

How are they different?
What revisions were made and why?
What effect did the changes have?

Use samples to have class develop a Characteristics of Effective Business Writing list

Type up and hand out list at next class

Business Writing Forms—memos & letters (10-15 minutes)

Purpose: to show participants the correct forms for memos and letters

Review forms from "better" writing samples

Discuss how to set up a memo and a letter

Write models on flip

Reflection (10-15 minutes)

Purpose: to give participants the opportunity to recognize, discuss and write about what they learned in class

Each class, participants discuss and record learnings in a journal

Sample questions

What did you learn today?

What do you want to remember from today's class?

What did you like/dislike?

How can you use what you learned today?

SUPERVISION BASICS

Session #21

Objectives

Participants will be able to write a letter and memo using the correct formats

Materials Needed

Flip chart, markers, tape

Agenda

Check-in
Review Objectives & Agenda
Business Writing Practice
Reflection

Description of Activities

Check-in (5-7 minutes)

Purpose: to find out participants' state of mind, to help participants get mentally ready for class

Ask participants to rate their mood on a scale of 1-10 (10 high, 1 low)

Review Objectives & Agenda (2-5 minutes)

Purpose: to preview class content for participants, so they know what to expect

Business Writing Practice (1 ½ - 1 ¾ hours)

Purpose: to have participants practice the writing skills discussed during the previous class, to have participants give and receive feedback about their writing

Review writing process and strategies for each stage

Handout Business Writing Practice Scenarios—see attached

Each participant chooses a practice situation

Facilitator floats and assists as necessary

Periodically stop and discuss writing process
- What has been easy or difficult so far?
- How did you organize your writing? (outline, mindmap, paragraph)
- What revision strategies have you used? (take out unnecessary, repeated words, add details that clarify the message, substitute strong words for weak ones)
- What would you like help on?

Participants share their writing in pairs—give each other feedback
- Use the Characteristics of Effective Business Writing list as a guide

Feedback rules
- Be specific about what you like about the writing
- Tell the writer if there are any unclear sections

If participants finish early, ask them to work on another piece of writing
- Everyone should complete 1-2 pieces

Large group processing of the writing
- What went well?
- What was difficult?
- What will you continue to work on?
- What did you learn?

Reflection (10-15 minutes)

Purpose: to give participants the opportunity to recognize, discuss and write about what they learned in class

Each class, participants discuss and record learnings in a journal
- Sample questions
  - What did you learn today?
  - What do you want to remember from today's class?
  - What did you like/dislike?
  - How can you use what you learned today?

WRITING STAGES

Sample

Organization:

Listening Skills
Assertiveness
Conflict Resolution
Facilitation Skills
Business Writing
Team Building
Public Speaking

Reading a novel—once a week, 4 weeks—something from best seller list

Rough Draft:

Heres a list of topics I could teach during January—listening, assertiveness, conflict, facilitation, business writing, team building, public speaking. Also, what about a reading discussion group, something from the best seller list. The group could meet once a week for four weeks.

Revision #1:

Here's a list of topics I could teach during a 4 week January session: listening skills, assertiveness, conflict resolution, business writing, team building, and public speaking.

Also, what do you think about offering a reading/discussion group? We could meet once a week for 4 weeks to discuss a book—perhaps one from the best seller list.

Revision #2:

Here's a list of topics I could teach during a 4 week January session: listening skills, assertiveness, conflict resolution, business writing, team building, and public speaking.

Also, what do you think about offering a reading/discussion group? We could meet once a week for 4 weeks to discuss a book—perhaps one from the best seller list, or one that has been made into a movie.

If you would like to offer any of these, let me know. Id be happy to write up a description for enrollment. I am available to teach Tuesday, Thursday & Friday from 2:30-4:30.

BUSINESS WRITING SAMPLES

POOR:

To: All Sales Representatives

From: Jim Martin

Date: July 15, 19XX

Subj: Sales Meeting

Re phone contact of July 8, final sales totals for the quarter ended June are enclosed herewith. A planning conference for all sales personnel will be scheduled for the near future and these figures will be discussed. I t is hoped that all district managers will be aware that the figures are such that reductions in the total number of dealerships and retail units may be indicated. A meeting to discuss this matter will be held on Friday, 18 July, at 3 p.m., in the regional manger's office. Thank you for your c operation.

BETTER:

To: All Sales Representatives

From: Jim Martin

Date: July 15, 19XX

Subj: Sales Meeting

Please attend a sales meeting on Friday, July 18 at 3 p.m. in the regional manager's office. We will discuss the attached quarterly sales totals.

This meeting is important because we may have to reduce dealerships and retail units.

Source: Brock, Susan. Better Business Writing. p. 35.

POOR:

XYZ ACCOUNTING CORPORATION
1420 Fremont Way
Oakdale, CA 95123
(805) 772-4322

July 2, 19XX

Mr. John Freeman
ABC Enterprises

Dear John:

In response to your letter of June 15, 19XX, enclosed please find Exhibit A. As you can see, the work performed for you this year is different than last year. In addition, the parameters of tasks increased since last year. Accordingly due to this fact and the fact that our billing rates were raised this year; it was necessary to increase our charges for professional services rendered. Hopefully, this letter offers some explanation as to the questions you raised. If you require more additional information, please don't hesitate to contact us.

Sincerely,

XYZ Accounting Corporation

Source: Brock, Susan. Better Business Writing. p. 33.

BETTER:

XYZ ACCOUNTING CORPORATION
1420 Fremont Way
Oakdale, CA 95123
(805) 772-4322

July 2, 19XX

Mr. John Freeman
ABC Enterprises
1000 Welch Way
Fountain Canyon, AZ 84666

Dear John:

We understand your concern, and hope the following will answer your questions regarding the increase in our bill:

1. Last year we spent 12 hours (@ $80/hour) preparing two tax returns for you.

2. This year we spent 15 hours (@ $100/hour) preparing four tax returns for you.

3. This year we successfully represented you in an audit with the Internal Revenue Service (3 hours @ $100/hour).

4. This year we produced monthly financial statements for you, whereas last year we produced quarterly financial statements.

Please call me if you would like to discuss this further. We value you as a client.

Sincerely,

Marianna Evers, CPA
XYZ Accounting Corporation

ME/jdc

Source: Brock, Susan. Better Business Writing. p. 32.

POOR:

To: John Williams

From: Marsha Brown

Date: May 12, 19XX

Re: Denial of your request for transfer

I regret to inform you that your request for transfer to our San Francisco office has been denied. At this point in time, there are no positions open for which you are qualified. Thank you for your understanding.

BETTER:

To: John Williams

From: Marsha Brown

Date: May 12, 19XX

Re: Response to your transfer request

After we spoke last week, I checked into the possibility of your transferring to our San Francisco office. Unfortunately, I learned a transfer is not currently possible for two reasons. First, our department needs your experience and skills for new product marketing. Second, this year San Francisco is expanding its accounting department only.

I am sorry your proposed transfer did not work out. Please let me know if I can assist you in any other way.

Source: Brock, Susan. Better Business Writing. p. 38-39.

BUSINESS WRITING PRACTICE

Choose one of the following situations to write about:

- Write a letter applying for the job of supervisor. Explain why you are qualified for the position.
- Write a memo to employees explaining how to operate a specific machine.
- Write a letter to a customer apologizing for the poor quality tools they received.
- Write a memo to employees inviting them to the annual Christmas party.
- Write a letter to an employee thanking him/her for doing a good job. Be specific.
- Write a memo to the plant manager requesting that a policy be changed.
- Write a letter or memo on a subject of your choosing.

SUPERVISION BASICS SECTION #9

Conclusion

Session 22

Major Objectives:

Participants will be able to discuss course content and learnings

Participants will be able to identify areas for future development

Major Activities:

Class Review

Paperwork

SUPERVISION BASICS

Session #22

Objectives

Wrap-up the course, process learnings

Materials Needed

Flip chart, markers, tape

Agenda

Check-in
Review Objectives & Agenda
Review Class
Complete Paperwork
Celebrate!

Description of Activities

Check-in (5-7 minutes)

Purpose: to find out participants' state of mind, to help participants get mentally ready for class

Ask participants to rate their mood on a scale of 1-10 (10 high, 1 low)

Review Objectives & Agenda (2-5 minutes)

Purpose: to preview class content for participants, so they know what to expect

Review Class (15-20 minutes)

Purpose: to review course, discuss learnings

Use class outline to review each topic area

What do you remember about what we did?
What did you learn?
How will you use what you learned?
What would you do differently?
What else would you like to learn?

Review supervision questions

Did all of them get answered?

Complete Paperwork (15-20 minutes)

Purpose: to help participants recognize the skills they have gained, to receive feedback on the course

I-Can, Feedback on the Workplace Education Course, Feedback on the Workplace Education Program

Discuss

Celebrate (30-45 minutes)

Purpose: to recognize the accomplishments of participants

Facilitator sums up class, thanks participants,

Food, Conversation & Games (ex.—Pictionary)